



Exporting data

You may want to export some of your Membership Plus data to use it or manipulate it in another application. Membership Plus provides a wizard that helps you export the data you want in a format that will be usable.

To launch the Export Data Wizard,

- From the File menu, choose Export.

The Export Data Wizard is structured as a series of choices and questions, each step contained in one of a sequence of dialog boxes.

Choose export template file (Step 1, Export Data Wizard)

Step 1 of the Export Data Wizard is to select an export template file. If you've exported data before and saved settings from that export, you can export data quickly using the exact same settings. Otherwise, you can select to begin a new export.

To start a new export,

- Mark the Begin New Export radio button.

To select an export template file,

1. Mark the Use Options in This Export Template File radio button.
2. Click the Browse button and locate the desired file.
3. Mark the Skip to Final Step check box if you do not need to make any changes to the settings in the template.

When you've indicated your selection, click Next to proceed.

Choose data type to export (Step 2, Export Data Wizard)

Step 2 of the Export Data Wizard is to select the type of data to export. Because your need for data outside the Membership Plus program typically is focused on a particular type of data, there's no need to export all the data. Instead, you export only what you need.

To select the type of data you want to export,

- Mark the option that corresponds most closely to the type of data you want to export.

When you've indicated your selection, click Next to proceed.

Choose fields to export (Step 3, Export Data Wizard)

Step 3 of the Export Data Wizard is to select the fields you want to export. Some fields are selected for you, based on your selections in the previous steps. Available fields vary according to the type of data you selected to export.

To select the fields you want to export,

1. Locate the desired field in the Available Fields tree view.
2. Click the Add Field button to move the field into the Selected Fields list.
3. (Click the Remove Field button to remove a selection.)
4. Repeat until all desired fields have been selected.

Use the arrow buttons on the right list to rearrange the selected fields, if necessary. Membership Plus places the fields in the export file in the order indicated. When you've made your selections, click Next to proceed.

Set basic filters (Step 4, Export Data Wizard)

Step 4 of the Export Data Wizard is to specify the most basic criteria for including data in the export. If you are exporting time-sensitive data, you can enter a date range for the data in this step. Options vary slightly according to the type of data you selected to export.

To filter on member type,

- Mark the check boxes to indicate the types of members you want to include. If you don't want to limit the export to only members of a particular type, mark all the check boxes.

To filter on group membership,

1. Mark the Include Only Members of Certain Groups check box.
2. Click the Select Groups button to open the Select Groups dialog box.

To filter by date,

- Specify the desired date range in the fields provided.

When you've specified your basic filters, click Next to proceed.

Define filters (Step 5, Export Data Wizard)

Step 5 of the Export Data Wizard is to set any additional filters to limit the data that is to be exported.

To define the filters for your report,

- Click the Select Filters button to open the Stored Filters dialog box, where you can define a new filter or select a previously created one.
- Click the Clear Filters button, if desired, to remove all filter selections.

When you've specified any additional filters to use for limiting the export data, click Next to proceed.

Choose sort order (Step 6, Export Data Wizard)

Step 6 of the Export Data Wizard is to specify the sort order for records that are to be exported. For example, for mailing purposes you might want to sort by ZIP Code.

To specify the desired sort order(s),

1. Use the Available Fields tree view to locate the desired field.
2. Highlight the field to select it and click the Add Field button.
3. The selected field appears in the Sort By list. Mark the appropriate radio button to indicate whether to use an ascending or descending sort.
4. Repeat to select secondary and tertiary sort criteria, if desired.

Use the arrow buttons on the right to rearrange the selected fields, if necessary. Membership Plus uses the first item in the list as the primary sort criterion; additional sort criteria are used in the order indicated. When you've specified your sort criteria, click Next to proceed.

Choose file format (Step 7, Export Data Wizard)

Step 7 of the Export Data Wizard is to specify the format in which the export file should be created. You can select from among several of the most common text, database, and spreadsheet formats.

To select the desired export file format,

1. Mark the radio button for the option that corresponds to the desired format.

Consult the documentation for the program in which you plan to use the data for advice in making a selection.

2. (Text formats only) Mark the Include Header Record check box if you need to export a header record of field labels.

When you've specified the desired file format, click Next to proceed. If you selected the delimited text file format, you'll move to Step 8. Otherwise, you'll proceed to Step 9.

Choose separator and quote (Step 8, Export Data Wizard)

Step 8 of the Export Data Wizard is to specify the desired separator and quote used to delimit records. Step 8 only appears if you selected to export data in one of the available text formats.

To set your options,

1. Specify the desired separator—commas, tab characters, or some other character. If you select Other, a field is displayed for you to enter the desired character.
2. Indicate which fields should be surrounded with quotes—all, none, or alphanumerics only.
3. Unless you selected no quotes in Step 2 above, indicate the type of quotation mark to use—double, single, or other. If you select Other, a field is displayed for you to enter the desired character.

As you make your selections, a sample at the bottom of the screen shows the formatting that will be used. Consult the documentation for the program in which you plan to use the data for advice in making selections in this step.

When you've specified the desired separator and quote options, click Next to proceed.

Choose file name (Step 9, Export Data Wizard)

Step 9 of the Export Data Wizard is to specify a name for the export file and, optionally, an export template file that can be reused. Your selected options are shown at the top of the Step 9 wizard dialog box.

To specify a name for the export file,

1. Click the Browse button in the Destination File box.
2. Specify the name and location for the file and click Save.

To save the export options for future use,

1. Mark the Save Current Export Options to File check box.
2. Click the corresponding Browse button in the Export Options box.
3. Specify the name and location for the file and click Save.

When you've specified a name for your export file (and export template file, if desire), click the Export button to create the export file.

Create the export file (Final Step, Export Data Wizard)

The final step of the Export Data Wizard is performed automatically when you click the Export button in the previous step. Membership Plus creates the export file according to the criteria you specified.

A meter bar tracks the progress, and a counter below the meter bar indicates the number of records processed.

To cancel the export process, if necessary,

- Click the Cancel button in the upper middle part of the dialog box.

When the export is complete,

- Click Close to return to your previous location in the Membership Plus program.